

# Delighting Your Tax Service Customers

Exceeding Your  
Clients' Expectations

*June 28, 2005*

# Delighting Your Customer

- 80% in USA employed in service industries
- Your technical expertise is expected
- Few clients check resumes or college transcripts

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# **\*Segmentation**

- Groups of clients similar in the way they value, use, and buy your product or services
- By age, sex, gender, income, location.....etc.

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# Segmentation

- Disabled
- 1<sup>st</sup> time filers
- Cultures/Race
- 18 wheel truck drivers
- Low income, etc. etc.

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# **\*Focus**

- Can't be all things to all segments
- Pareto's 80/20 rule
- Successful companies target market

# \*Differentiate

## ➤ Balance the 3 C's

- Your Company's capabilities with.....
- Your target Customer's priority needs with.....
- Your Competitor's capabilities

# **\*Do you remember?**

- **SWOT** (Strengths, Weaknesses, External Opportunities, External Threats)
- **SMART** (Simple, Measurable, Achievable, Realistic, Timely)
- **C.A.R.E.** (Connect, Attentive, Responsible, Enthusiastic)

# C.A.S.T.

- **C**onsistency
- **A**ttitude
- **S**ervice
- **T**eamwork

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# \*C.A.S.T.

➤ C

➤ A

➤ Service – making serving others your #1 priority

➤ T

# Santa Fe NM Hotel

- 2 nights confirmed stay by Gold Awards member
- 2 large families with small children check in adjacent room and room across hall

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## **\*How should hotel clerk handle complaint?**

- A)** "Sorry, no other rooms available?"
- B)** "How noisy is it really?"
- C)** Offer new room
- D)** Offer new room with bellhop assistance

# Southwestern Furniture Store

- New Mexico store visited by Denver residents
- Dozens of southwestern furniture stores in New Mexico

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# How to serve Denver customers?

- A) Ignore unless asked
- B) "Can I help you"
- C) "What are you looking for?"
- D) "C" plus " Take photos, check in-store web site, what fabric samples would you like?"

# \*C.A.S.T.

➤ C

➤ **A**ttitude – a manner of acting and thinking that shows one's disposition.

➤ S

➤ T

# Souvenir Shop

- Sunday 6PM close
- Customer arrives 5:55PM with specific purchase request
- Employee locking doors

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# Souvenir Shop employee should?

- A) "Sorry, we're closed"
- B) "Are you sure you only need 5 minutes"
- C) "Come in, what you want is downstairs...ask for Ed!"

# CPA with Perspective Client

- Introduced in presence of existing client
- 60 minute meeting split 50/50 existing/perspective client

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## **\*CPA should?**

- A)** Charge normal \$200/hour rate
- B)** Charge \$200 with \$100 future credit
- C)** Only charge existing client 1/2 hour
- D)** No charge

# \*C.A.S.T.

➤ **C**onsistency – giving clients what they expect – every time!

➤ **A**

➤ **S**

➤ **T**

# Replacement Window Company

- 2nd \$10,000+ installation for customer
- 1st installation a "10" on 1-10
- 2nd installation late timing, partial completions, missing parts, sloppy workmanship, incorrect security locks

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# **\*Window company should?**

- A)** Invoice full amount
- B)** Invoice with credit for inconvenience
- C)** "B" with free UV film protection on all windows

# Marriott Redmond, WA

- Guest Gold Rewards member
- Cashmere sweater and sentimental sweat shirt left in room
- Contacted hotel General Manager 36 hours after check out

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# General Manager should?

- A) Delegate to subordinate
- B) Take personal responsibility to follow up
- C) Locate items, send items overnight, and pay all shipping costs

# Marriott Mountain Shadow

- Guest Gold Rewards member
- Obstructed view room
- Off season, hotel appears 30% occupied

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# Hotel clerk should?

- A) "Because of renovation, only room we have in your price category"
- B) Offer upgraded room
- C) Offer another Marriott property
- D) Any of above plus 50% off dinner

# \*C.A.S.T.

➤ C

➤ A

➤ S

➤ Teamwork – everything we do eventually ends up in front of the client; look for ways to make each other look good

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# Upscale Restaurant

- Expensive gloves worn into restaurant
- Gloves noticed missing after leaving restaurant
- Diners call late evening

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# **\*Restaurant employee should?**

- A) "We'll check and call if we find glove"
- B) "We'll check and call either way"
- C) "We'll check and call either way. If not found feel free to come and look yourself"

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# Discount Liquor Store

- Customer buying 2 cases low price wine
- Asked store clerk location of specific moderately priced wine
- Designated shelf space empty

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# **\*Liquor store clerk should?**

- A) Ignore empty shelf
- B) Apologize for empty shelf
- C) Ask you to wait till he finds some
- D) Suggest you finish your purchases and he'll bring you the 2 requested bottles at check out line

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# \*Summary

- You can't be all things to all people
- Segment/Focus/Differentiate
- Develop relationships!
- Exceed customer expectations!

# **\*Delighted customer?**

- Santa Fe Hotel
- Southwest Furniture Store
- Souvenir Shop
- CPA new/existing client

# **\*Delighted customer?**

- Replacement Window Company
- Marriott Hotels
- Lost gloves - restaurant
- Discount liquor store

# \*C.A.S.T.

- Consistency
- Attitude
- Service
- Teamwork

"Give 'em the Pickle" with Bob Farrell, from [www.starthrower.com](http://www.starthrower.com) , 1-866-236-3050

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# **\*Thank You!**

**SIMON SAYS** *"Thank You"* for allowing me to share my ideas and experiences on customer service with you. For more information on training/consulting from SIMON SAYS Consulting, or for a copy of this video, please call 303-399-2879, email [sulmer@aol.com](mailto:sulmer@aol.com) or write:

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